

**ADDENDUM NUMBER 1**  
**DATED JANUARY 31, 2019**  
**TO**  
**SPECIFICATIONS TO REQUEST FOR PROPOSALS #19-6008-LL-U**  
**FOR**  
**PROJECT ONLINE IMPLEMENTATION CONSULTING SERVICES**  
**DATED JANUARY 2, 2019**



MISSOURI

The above entitled specifications are hereby modified as follows and except as set forth herein otherwise remain unchanged and in full force and effect.

**Return Date Extension**

Due to the amount of questions, we have received; we are extending the due date for return of proposals to February 21, 2019 at 2:00 PM, CST. All proposals must be received at the University of Missouri Supply Chain Offices at 2910 Lemone Industrial Blvd., Columbia, MO 65201 by the and time indicated above.

**Clarification Questions**

The following questions have been submitted by vendors and the responses are provided below each question in order to provide additional information.

- 1) **Question:** Regarding Limiting Criteria, 9.8 of the RFP (on page 20), please clarify the vendor's responsibilities related to configuring the system
  - a. Will the vendor be performing any system administration and configuration activities?  
**Answer:** Yes, when needed to help university administrators learn administration and configuration during the length of the engagement.
  - b. Will the vendor have direct access to perform system administration and configuration activities?  
**Answer:** Yes, we will provide courtesy accounts.
  
- 2) **Question:** If the vendor is will perform some configuration, which activities does the University of Missouri anticipate will be completed by the vendor and which will be completed by university administrators?  
**Answer:** Vendor will provide support for workflow (and associated web pages), integration with Project Planner, report/dashboard development, account maintenance, and resource management. It is anticipated that the university can do the remainder. The university will discuss the exact division of labor at kick-off.
  
- 3) **Question:** Regarding Limiting Criteria 9.8 of the RFP (on page 20), approximately how many of the following will be configured within University of Missouri's Project Online environment?
  - a. Project Templates **Answer:** Initially, one per campus.
  - b. Enterprise calendars **Answer:** One out of the box.
  - c. Schedule Templates **Answer:** Initially, one per campus.
  - d. Project site templates **Answer:** One per Campus
  - e. Resources **Answer:** up to 250 for all campuses combined.  
Campuses will share resources; all must be accessible.

- f. Login users **Answer:** No more than 50
- g. Custom Fields **Answer:** Not sure, but we would discuss what custom fields we use today in Planview PPM Pro and what we would like to transfer to Project Online.
- h. Custom views **Answer:** Approx. 10

- 4) **Question:** Regarding Limiting Criteria 9.9 of the RFP (on page 20), how many user are anticipated to be submitting project requests?  
**Answer:** Not many at the onset we will have to have the workflow in place and train people to submit requests via workflow.
- 5) **Question:** Regarding Limiting Criteria 9.11 of the RFP (on page 20), will reports/dashboards be developed from scratch, or do they currently exist in some format (e.g. Excel)?  
**Answer:** An example of an Alternate Current Project Status Report is attached to this Addendum. The example provided is for MU/UM System. We may further customize this one. The other three campuses will likely customize theirs using roughly the same information items.
- 6) **Question:** Regarding Limiting Criteria 9.12 of the RFP (on page 21), How Many projects are to be migrated from Planview PPM Pro/Innotas to Project Online? Is there any other legacy system data the vendor is required to load?  
**Answer:** No more than 50. We expect to migrate most by hand (there is an export utility in Planview PPM Pro).
- 7) **Question:** Are there any training requirements associated with this engagement?  
**Answer:** No formal training is anticipated from the vendor, we will develop the training in-house.
- 8) **Question:** Is there information available regarding the types and anticipated number of system users?
- a. Portfolio managers anticipated **Answer:** 20, five (5) for each campus
  - b. Resource managers anticipated **Answer:** Two (2) for each campus
  - c. Project managers anticipated **Answer:** No more than 25
  - d. General (team member) anticipated **Answer:** No more than 250 when in full use.
- 9) **Question:** Are vendor provider resources allowed to perform work remotely and if yes, is there a minimum number of on-site visits required/desired?  
**Answer:** Yes, there is no minimum number of on-site visits.
- 10) **Question:** What individual environments are required (e.g., development, test, production)?  
**Answer:** If feasible, test and production sites. Today, we only use a production site, which in practice has worked fine. At this point, we are unsure if multiple environments are possible.
- 11) **Question:** What, if any, documentation is required (e.g., configuration summary)?  
**Answer:** A initial configuration summary is likely the only documentation we'll need. We will discuss anything else you might recommend at kick-off.
- 12) **Question:** Is Active Directory integrated/synced with Office365? If not, is this part of scope to integrate AD to Office 365?  
**Answer:** We will handle integration. We are now in the process of flattening our AD structure before we can use O365.
- 13) **Question:** What are the critical capabilities you need from the new tool by the time your Plainview PPM ends (April 2019)?  
**Answer:** The ability to track individual projects and resources.

- 14) **Question:** What are the non-critical capabilities you need that can be done after April, if any?  
**Answer:** Portfolio management and integration with Microsoft Planner.
- 15) **Question:** Previously, UM issued a RFP (17-4011-HR-C), it has more details under Statement of Work. Are those tasks still highly relevant?  
**Answer:** Only the current RFP is relevant.
- 16) **Question:** An award was not made to any vendor who participated in a previous RFP of similar scope (17-4011-HR-C). Is there a reason that the school was not able to select a vendor?  
**Answer:** The University is not technically ready to implement O365.
- 17) **Question:** If possible, tell us what the main issue is with Planview. What improvements would you like to see with Project Online?  
**Answer:** Budgetary reasons has prompted us to look for another solution. Planview PPM Pro is an excellent service.
- 18) **Question:** How do you want vendors to demonstrate they have 10 or more years of experience deploying Project/Server/Online?  
**Answer:** Provide a history of individual consultant and/or company Project Service/Project Online implementation engagements. **Question:** For 508 requirement – Does this apply since you have selected Project Online and 508 certification is a responsibility of the manufacture and not the consultant.  
**Answer:** Microsoft is responsible for 508 requirements.
- 19) **Question:** Please send sketch of the desired Dashboards needing creation.  
**Answer:** Dashboards are part of the RFP document.
- 20) **Question:** Please explain what “Consultant to assist staff” refers too?  
**Answer:** We have already had experience with Project Server and SharePoint. We are requesting a consultant to help us configure the system correctly where we do not have the sufficient knowledge to do so ourselves.
- 21) **Question:** Is being onsite for discovery and training and then to perform configuration work remotely to minimize customer costs acceptable?  
**Answer:** We will (likely) perform our own project manager and end-user training. We are open to ideas on administrator training where we do not have sufficient knowledge.
- 22) **Question:** Do you want recommended training included with proposal?  
**Answer:** Administrator training.
- 23) **Question:** Is it useful to have apps/features available from vendor to support facility and constructions management projects?  
**Answer:** No, only IT projects.
- 24) **Question:** Regarding Section 2 in the RFP, does the University have Microsoft Office 365 in place today?  
**Answer:** No. We have an open implementation project.
- 25) **Question:** Are there plans to move the University to Microsoft 365?  
**Answer:** Yes.
- 26) **Question:** Is Active Directory synchronization with your Office 365 environment in place?  
**Answer:** Not at this time. It is part of an open O365 implementation project.
- 27) **Question:** Provide the names of the groups/departments who will be participating within the requirements gathering process?

**Answer:** UM System/MU Strategic PMO's and the PMO's on UMKC, UMSL and MO S&T campuses.

28) **Question:** Is it desired to have as option Project Finance Management features that include the following:

- a. Track budget, Cost, Change Orders & Cost Variances by charge code?  
**Answer:** Not initially, as we do not use this today, but would be open to future use.
- b. Show budget by year or summarized?  
**Answer:** Not initially, as we do not use this today, but would be open to future use.
- c. Import payments and timesheets?  
**Answer:** No
- d. Track Adjustments?  
**Answer:** Not initially, as we do not use this today, but would be open to future use.
- e. Track historical changes?  
**Answer:** Yes, using baselines.

29) **Question:** Is it desired to have Strategy Development features like the following:

- a. Inputting the business case for potential investment ideas?  
**Answer:** Yes.
- b. Track fund sources, budget and benefits?  
**Answer:** Not initially, as we do not use this today, but would be open to future use.
- c. Input a resource plan of hours needed by resource category?  
**Answer:** Not initially, as we do not use this today, but would be open to future use.
- d. A method to score investment ideas?  
**Answer:** Not initially, as we do not use this today, but would be open to future use.
- e. A method to allow multiple stakeholders to vote on ideas?  
**Answer:** Not initially, as we do not use this today, but would be open to future use.
- f. The ability to select ideas strategic value, cost, ROI, benefits (or other KPI)?  
**Answer:** Yes, in relation to business cases.
- g. The ability to determine when ideas could be executed with available resources without over allocation?  
**Answer:** Not initially, as we do not use this today, but would be open to future use.
- h. Send email notifications when approvals are needed?  
**Answer:** Yes
- i. Provide CIP Report of approved projects with cost & fund summaries for annual budget?  
**Answer:** Not familiar with CIP and we are not currently using budgeting, but would be open to using the future.

30) **Question:** Is it desired to have Post Execution features like the following?

- a. Track Benefits received.  
**Answer:** Yes, but initially only non-financial.
- b. Track lessons learned.  
**Answer:** Yes
- c. Track Project Evaluation  
**Answer:** Yes

31) **Question:** Regarding section 2 on RFP (on page 15), is the intention for the vendor to do the work or train the university's project online administrators to do the configuration?

**Answer:** We anticipate sharing the workload under the guidance/leadership of the consultant. For areas where our knowledge is incomplete, we will expect the consultant to take the lead, e.g. workload, integrations with MS Planner, reports/dashboards, etc.

32) **Question:** How many individuals will participate during the requirements gathering and acceptance process?

**Answer:** At least two (2) people per campus. There may be more based on interest.

- 33) **Question:** Does the University anticipate that groups/departments will have the same functional requirements for the to-be system, or will each group look to be using the system in distinct ways?  
**Answer:** We will use the system similarly. We may use different reports, views and dashboards.
- 34) **Question:** Does the University prefer the method of delivering SaaS tool knowledge transfer sessions, in person classroom training or virtual?  
**Answer:** Virtual is fine; I expect knowledge transfer will be ad hoc.
- 35) **Question:** Should the training incorporate how the tool functionality support the business processes or is tool-focused training sufficient?  
**Answer:** We want to configure the tool around our current business processes.
- 36) **Question:** Is it the desire of the University to have dedicated administrative support after the targeted Go-Live date? If so, how many weeks.  
**Answer:** It is our goal to take over administration, using the consultant to fill in knowledge gaps as they occur. We can decide on the number of weeks towards the end of the implementation.
- 37) **Question:** What specific projects or other information needs to be migrated from the PPM system to the selected SaaS within the scope of the initial implementation.  
**Answer:** It is our goal to export projects from Planview PPM Pro and stand-alone MS Project clients by hand.
- 38) **Question:** For any projects that need to be migrated, what format are they in, i.e. MPP, Excel, etc.?  
**Answer:** They will all be MPP.
- 39) **Question:** Are there any project specific documents that will need to be loaded/migrated to the selected SaaS tool during the initial implementation?  
**Answer:** No. We use SharePoint 2010 for project document storage. We may manually move document content to Project Online.
- 40) **Question:** What is the maximum number of rates that a single resource will need at any given time?  
**Answer:** Two initially, out of the box. This is not critical.
- 41) **Question:** How many different lifecycle workflows does The University of Missouri estimate will need to be developed?  
**Answer:** Project Governance Committee approvals for charters and changes. May be a different process for each campus.
- 42) **Question:** Do any of the workflows branch?  
**Answer:** No, but we are open to making changes as needed.
- 43) **Question:** Do any of the lifecycle workflows involve routing approvals to specific users or groups based on specific project attributes?  
**Answer:** Yes.
- 44) **Question:** How many reviews/approvals happen for each lifecycle workflow?  
**Answer:** One for charter and one for each change.
- 45) **Question:** Does the University of Missouri have objective, meaningful business drivers and impact statements already defined?  
**Answer:** This will require guidance from the consultant to work through this with senior decision-makers. Today, the only driver is a consensus on what is important.
- 46) **Question:** Are you looking for guidance and training on how to do project portfolio management from a process perspective (beyond the tool)?

**Answer:** Yes, guidance.

47) **Question:** Does the University of Missouri want assistance in defining and establishing business drivers/impact statements?

**Answer:** Yes

48) **Question:** Are the three reports listed the only custom reports that should be included within the scope of the initial implementation?

**Answer:** Yes

49) **Question:** Are there current Planview PPM Pro/Innotas reports that need to be replicated?

**Answer:** Yes, but we anticipate writing them ourselves with consultant guidance as needed.

50) **Question:** Is there interest in a pre-configured solution with pre-built reports and dashboards (Versus building from scratch)?

**Answer:** We are open to the possibility.

51) **Question:** How many projects are there to move from Planview PPM Pro/Innotas to Project Online?

**Answer:** No more than 50 from MU/UMSYSTEM; we will add other from the other three campuses.

52) **Question:** How many of the above mentioned projects are currently “in flight”?

**Answer:** PGC (Project Governance Committee)-Approved projects: 44. There are others managed as operations projects: 9. Only UM System MU track in-flight projects in Planview PPM Pro. In flight projects for the other three campuses: S&T: 24, UMKC: 23 and UMSL: 24

53) **Question:** How many resources are there to move from Planview PPM Pro/Innotas to Project Online?

**Answer:** Depending on whether we can afford integrating with MS Planner, it will be fewer than 100. If we can integrate, we estimate 250.

54) **Question:** Is there any data other than projects and resources that need to move from Planview PPM Pro/Innotas to Project Online, I.e. project documentation, timesheet data, etc.?

**Answer:** We currently store project documentation in SharePoint 2010 (moving to 2016 this year).

55) **Question:** Does the University have a preference for how application training is delivered, i.e. onsite, remote, video?

**Answer:** Remote is fine.

THE CURATORS OF THE  
UNIVERSITY OF MISSOURI

*Leyanna Long*

By: Leyanna Long, Strategic Sourcing Specialist  
University of Missouri System Supply Chain

**Project Description and Objectives**

Goal	Objectives
Implement Project Online for the four campus IT departments to replace Planview PPM Pro by March 15, 2019—the date we must inform Planview PPM Pro that we are not going to renew.	<ol style="list-style-type: none"> <li>1. Configure Project Online with an emphasis on features when practical.</li> <li>2. Transfer current project information from Planview PPM Pro to Project Online.</li> <li>3. Replicate/expand upon desirable Planview PPM Pro features as closely as possible using Power BI.</li> <li>4. Train project, resource (chiefly DoIT managers) on Project Online timesheet users.</li> <li>5. Modify project processes and codify current project processes in Project Online features/boundaries.</li> </ol>

**Status Comments**

Most Recent Status Comments
<p>Current Status - Robb, Terry L 12/20/2018 9:37 AM CST</p> <ol style="list-style-type: none"> <li>1. We have completed internal work on the consultant solicitation. Opening set for mid-February.</li> <li>2. Made contact with Planview PPM Pro sales rep requesting pricing to extend our current contract month-to-month.</li> <li>3. Have worked up a tentative schedule.</li> <li>4. I'll be out all January. Emily Brown will stand in for me as PM.</li> </ol> <p>-----</p>

**Project Stoplights**

Overall	Cost	Issues	Resources	Risks	Scope	Schedule
Green	Green	Green	Green	Green	Green	Green

**Milestones**

Title	Target Date	Status	Late?
Planning Complete	11/1/2018	Closed	
Project Plan Complete	11/1/2018	Closed	
Workspace Complete	11/13/2018	Closed	
Charter Complete	11/27/2018	Closed	
Initiation Complete	11/27/2018	Closed	
Stakeholder Register Complete	11/27/2018	Closed	
Stakeholder Register	12/4/2018	Closed	
Charter	12/11/2018	Closed	
Contract Extension with Planview Complete	2/14/2019	Open	No
Consultant Solicitation Complete	2/27/2019	Open	No
Contract Complete	3/6/2019	Open	No
Phase I Complete	3/6/2019	Open	No
BIA Complete	4/12/2019	Open	No
Configuration Complete	4/26/2019	Open	No
Data Transfer Complete	4/29/2019	Open	No
Reports & Dashboards Complete	5/10/2019	Open	No
Testing Complete	5/24/2019	Open	No
Phase II Complete	5/24/2019	Open	No
Updated Cognos Packages Complete	5/24/2019	Open	No
Revised SOP Complete	5/31/2019	Open	No
Execution Complete	6/21/2019	Open	No
Phase III Complete	6/21/2019	Open	No
Training Videos Complete	6/21/2019	Open	No
Closure	7/8/2019	Open	No

**Completed Deliverables**

Title	Start Date	Completion Date
Workspace	11/1/2018	11/13/2018
Charter	11/1/2018	11/27/2018

**Future and Incomplete Deliverables**

Title	Start Date	Target Date	Late?
Contract Extension with Planview	2/1/2019	2/14/2019	No
Consultant Solicitation	11/1/2018	2/27/2019	No

Title	Start Date	Completion Date
Stakeholder Register	11/28/2018	11/27/2018
Project Plan	11/1/2018	12/4/2018

Title	Start Date	Target Date	Late?
Consultant Contract	2/28/2019	3/6/2019	No
BIA	4/1/2019	4/12/2019	No
Configuration	4/1/2019	4/26/2019	No
Data Transfer	4/29/2019	4/29/2019	No
Reports & Dashboards	4/15/2019	5/10/2019	No
Testing	4/29/2019	5/24/2019	No
Updated Cognos Packages (Optional)	4/1/2019	5/24/2019	No
Revised SOP	5/27/2019	5/31/2019	No
Ongoing Funding Model	5/27/2019	6/7/2019	No
Training Videos	5/27/2019	6/21/2019	No

**Late, In-Progress, and 30-Day Future Activities**

Parent	Activity	Start	Target	Late?	Scheduled Resources	Target Date
Consultant Solicitation	Review Responses and Award a Winner	2/14/2019	2/27/2019	No		2/27/2019 5:00 PM
<b>Consultant Solicitation</b>						
Contract Extension with Planview	Negotiate and Execute Contract with Planview	2/1/2019	2/14/2019	No		2/14/2019 5:00 PM
<b>Contract Extension with Planview</b>						

**Potential Risks Summary**

Name	Status	Priority	Description	Causes	Consequences	Assigned to:	Probable X Imp
Deadline Too Aggressive	Identified	2: High	The AD Consolidation and O365 Deployment Projects may delay the Project Online deployment.	AD Consolidation and O365 Deployment Projects	Forced to go month-to-month with Planview	Robb, Terry L	100.00
Insufficient In-House Knowledge to Implement Project Online	Seeking Resolution	2: High	We may not have sufficient knowledge in-house to deploy the application ourselves; having access to a consultant or MS Premier to fill knowledge gaps will mitigate the risk.	We don't have deep expertise in the implementation of Project Online	We'll make errors up front that could have a long-run detrimental impact on using the tool.	Robb, Terry L	33.00
Month-to-Month Contract with Planview May Be Cost-Prohibitive	Identified	2: High	Any delay in the AD Consolidation and O365 Deployment projects will force us to a short-term contract with Planview	AD Consolidation and O365 Deployment projects delay	High cost for month-to-month contract	Robb, Terry L	0.00

**Current Issues Summary**

Name	Priority	Description	Proposed Resolution	Status	Assigned to:
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Run As: Robb, Terry L